



2013 Minerals Yearbook

CZECH REPUBLIC

THE MINERAL INDUSTRY OF THE CZECH REPUBLIC

By Sean Xun

In 2013, the Czech Republic was estimated to have been the 4th-ranked producer of kaolin (with 8.9% of the world's production) in the world and the 13th-ranked producer of feldspar (1.9% of the world's production), by volume. The country did not produce metal ore, although some exploration projects (such as for gold and tin ores) were active. The country produced crude steel, pig iron, semimanufactured steel products, and secondary lead and aluminum metals in 2013. Mineral fuel production included coal, which was important to the country's domestic and regional markets; uranium, which was predominately consumed by domestic nuclear powerplants; and a small amount of crude oil and natural gas (Kolroser and others, 2014; Tanner, 2014; Virta, 2014; World Steel Association, 2014).

Minerals in the National Economy

The Czech Republic's economy contracted by 0.9% in 2013 compared with that of 2012, but it was in the process of recovering; the country's real gross domestic product (GDP) was projected to increase by 1.9% and 2.0% in 2014 and 2015, respectively. The mineral industry was not a substantial contributor to the national economy. The country's GDP in 2013 was about \$177 billion,¹ and of that amount, the value contributed by the mining and quarrying sector was about 0.96% (about \$1.7 billion) compared with 1.04% (\$2 billion) in 2012 (Czech Statistical Office, 2014b; International Monetary Fund, 2014a; 2014b, p. 54).

In 2013, the values of Czech exports and imports amounted to about \$163 billion and \$144 billion, respectively. The value of the mineral industry trade balance (including trade in metalliferous ores and metal scrap; manufactures made of metals; nonferrous metals; iron and steel; nonmetallic mineral manufactures; crude petroleum, refined petroleum products, and related materials; natural and manufactured gas; and coal, coke, and briquets) was a deficit of \$10.4 billion in 2013 compared with a deficit of \$10.1 billion in 2012. The estimated annual average nominal exchange rate was relatively stable during this timeframe. In 2013, the leading mineral product categories in the country's import portfolio included crude petroleum, refined petroleum products, and related materials (\$8.3 billion); iron and steel (\$6.7 billion); and natural and liquefied gas (\$5.5 billion). The leading export categories included manufacture of metals (\$5.5 billion), iron and steel (\$5.4 billion), nonmetallic mineral manufactures (\$2.9 billion), and petroleum, petroleum products, and related materials (\$1.8 billion). Mineral industry products accounted for about 23% of the total value of imported goods and about 14% of exported goods (Czech Statistical Office, 2014a).

¹Where necessary, values have been converted from Czech koruna (CZK) to U.S. dollars (US\$) at an average exchange rate of CZK19.6=US\$1.00 for 2012 and 2013. All values are nominal, at current prices, unless otherwise stated.

Government Policies and Programs

The laws applicable to the mineral industry include Act No. 44/1988 on the protection and use of mineral resources (the Mining Act), Czech National Council Act No. 62/1988 on geologic work (the geological act), and Act No. 61/1988 on mining operations, explosives, and the state mining administration. In addition, there are a variety of specific regulations on exploitation, geologic work, and licensing. The Ministry of the Environment enforces environmental laws in the mining sector. Domestic production of mineral fuels, such as coal and uranium, is also affected by the energy policy framework established by the Ministry of Industry and Trade in 2004 (Ministry of Industry and Trade, 2004, p. 6; Czech Geological Survey, 2012, p. 27–34).

In 2013, several mining companies, including Astur Bohemia, applied for gold exploration licenses in the country with the expectation that a two-decade-old regulation restricting extraction of the precious metal would be lifted. In September 2013, a new initiative of the European Commission, the European Partnership, was introduced to ensure appropriate implementation of relevant laws in land use, mining waste, and sustainable management of resources. In December 2013, a revised version of the environmental impact assessment directive was agreed upon by the European Parliament, establishing more demanding rules on permitting assessment of industrial projects, including mining projects (Bardsley, 2013; European Association of Mining Industries, Metal Ores, and Industrial Minerals, 2014, p. 21; Ploumis, 2014; Richter, 2014).

Production

In 2013, production of most industrial minerals decreased substantially from that of 2012, including gypsum and anhydrite (by 21%), foundry sand (16%), brick clay (14%), silica minerals (12%), dolomite (11%), dimension stone (8%), common sand and gravel (8%), feldspar (8%), and cement and kaolin (6% each). Production of pyrope-garnet-bearing rock and diatomite increased by 33% and 14%, respectively. Overall production of minerals used intensively in construction was at an alltime low in 2013 owing to the stagnation of the country's construction industry. Total coal production decreased by 10% to 49 million metric tons (Mt). Bituminous coal production decreased by 22% and lignite by 7% compared with that of 2012. The production decreases were the result of the decreased price of coal on the world market. Mine output of uranium increased by 4.5% compared with that of 2012. Production of crude oil increased by 1%. Refinery production decreased by 9% from 2012, primarily owing to the scheduled maintenance shutdown at the Kralupy facility. Crude steel production was 5.171 Mt compared with 5.072 Mt in 2012. Secondary lead production decreased by 7% to 28,000 metric tons (t) from 30,000 t in 2012 (table 1).

Structure of the Mineral Industry

In 2013, coal mining in the Czech Republic was affected by low coal prices on the world market. Some noticeable structural changes took place as the industry struggled to improve profitability. In November 2013, New World Resources Plc (NWR) sold its coking subsidiary Ostravsko-Karvinské Koksovny a.s. (OKK) to the Metallmex Group for about \$126 million. NWR's other subsidiary, Ostravsko-Karvinské Doly a.s. (OKD), which was the Czech Republic's leading coal mining company and one of the country's leading private employers, was in negotiations with the Government for subsidies to prolong mining activities in view of continued operational challenges. NWR announced the permanent closure of the Paskov bituminous mine by the end of 2014. In July 2013, the lignite mining company Litvinovska Uhelna a.s. was spun off from Czech Coal and its name changed to Severní Energetická a.s. In October 2012, Trinecké Železárny a.s. (the nation's leading steel producer) acquired ZDB Drátovna a.s., which operated a wire-producing plant, from Bonatrans Group Holding. ZDB Drátovna a.s. had annual sales of about \$163 million, with 80% of production exported (Kolroser and others, 2014; New World Resources N.V., 2014, p. 2–8; Trinecké Železárny a.s., 2014). Table 2 lists major mineral industry facilities.

Commodity Review

Metals

Iron and Steel.—In 2013, the Czech Republic imported about 6.3 Mt of iron ore and concentrate for steel production compared with 5.9 Mt in 2012. According to the World Steel Association, the country produced 5.2 Mt of crude steel, of which continuous-cast steel output accounted for 91%. Production by oxygen process accounted for 93%, and electric process, 7%. In 2013, 1.9 Mt of ferrous scrap was exported, and 0.5 Mt of ferrous scrap was imported. Apparent consumption of steel use (finished steel products) was 5.8 Mt and that of pig iron was 4.4 Mt. Employment in the steel sector decreased by 5% to 7% each year from 2010 to 2012. Production in 2013, in terms of volume, was slightly higher than in 2012. A modest increase was expected in 2014. The steel industry in the Czech Republic was facing mounting financial burden induced by regulations on renewable energy and limits on steel production. Between 2010 and 2020, steelmakers were anticipated to pay about \$1.02 billion in renewable energy fees and spend about \$362 million to stay in compliance with emission regulations (Vokurkova, 2013; Czech Statistical Office, 2014c; World Steel Association, 2014, p. 9–10, 16, 18, 26).

Tin.—On December 18, Equamineral Holdings of Australia acquired 100% of the shares of European Metals Holdings of the United Kingdom, which consisted of the Cinovec tin-tungsten-lithium project and the Zlatý Kopec tin-zinc-indium project in the Czech Republic. The Cinovec project is located 100 kilometers northwest of Prague on the border with Germany. The inferred resources of the Cinovec project included 28.1 Mt grading 0.37% tin and 0.04% tungsten and

36.8 Mt grading 0.8% lithium oxide. The total contained tin was estimated to be more than 100,000 t. After the acquisition, the company planned to conduct initial drilling and twinning of previous holes to enable a resource upgrade and provide samples for metallurgical testing. A scoping study was planned to be completed in 2014 (European Metals Holdings, 2013; Proactive Investors, 2014).

Industrial Minerals

Cement.—In 2013, both production and consumption of cement in the Czech Republic decreased by 6.5% from the levels of 2012. About 600,000 t (19% of total production) was exported. The four major producers (five facilities) had a total combined capacity of 5.7 million metric tons per year. A noticeable change in the cement industry was the continuous improvement in environmental performance, which was evidenced from the increased share of biomass and alternative energy for clinker burning and the decreased emissions of dust, carbon dioxide (CO₂), sulfur dioxide (SO₂), and nitrogen oxides (NO_x). Coal accounted for about 39% of total fuel consumption in cement production in 2013 compared with 44% in 2012 and 62% in 2000, and biomass accounted for 23% in 2013 compared with 21% in 2012 and 0% in 2000. Compared with 2012, the emissions of NO_x, CO₂, dust, and SO₂ per unit of cement production decreased by 19%, 15%, 11%, and 9%, respectively (Czech Cement Association, 2014).

Mineral Fuels and Related Materials

Coal.—The Czech Republic was estimated to have 825 Mt of recoverable lignite reserves, which was economically the most important domestic energy resource. In 2013, lignite and bituminous coal accounted for 39% of total energy consumption and 41% of electricity generation. Of the coal produced in 2013, 1.2 Mt of lignite and 2.1 Mt of bituminous coal were exported. Coal production decreased sharply in 2013, accompanied by structural changes in the industry to improve profitability. According to the energy policy framework of the Nation, planned consumption of coal would decrease by 25% from 2005 to 2030. Nevertheless, coal would remain a major energy source in the country, accounting for 30% of primary energy sources in 2030 (Ministry of Industry and Trade, 2004, p. 47; 2014; Czech Geological Survey, 2014; Czech Statistical Office, 2014c).

Uranium.—Uranium fuel accounted for 19% of total energy consumption and 35% of electricity generation in the Czech Republic in 2013. The CEZ Group operated the Dukovany and the Temelin nuclear powerplants that together had a total installed capacity of 4,290 megawatts. Preparations for additions of new units at both powerplants were underway. According to the Government's energy policy framework, power generation from nuclear powerplants would increase by 32% from 2005 to 2030. Government-owned DIAMO s.p. produced 232 t of uranium in 2013 compared with 222 t in 2012. The company was planning to reopen the Brzkov-Veznice Mine to make up for decreased production at the Rozna Mine, which was expected to be depleted in 4 years. The uranium concentrate was exported to Russia, and nuclear fuel rods were imported

from Russia; the amount of uranium exported to Russia was less than the amount of uranium in the fuel rod products imported from Russia. The planned nuclear power expansion and the anticipated decrease in domestic uranium production could lead to a higher level of dependence on energy imports (České Energetické Závody a.s., 2014, p. 96, 102–104; Kolroser and others, 2014; Ministry of Industry and Trade, 2004, p. 47; 2014).

Outlook

Although the international and domestic economic conditions are expected to improve in 2014 compared with those of 2013, which may help the recovery of mineral production in the Czech Republic, the uranium and coal mining activities in the country are expected to decrease gradually in the near term because of low market prices and environmental concerns. Dependence on energy imports are likely to continue to increase and affect the trade balance negatively. Limited exploration of metal ores (such as gold) will continue but future policy on such activities is uncertain.

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TABLE 1
CZECH REPUBLIC: PRODUCTION OF MINERAL COMMODITIES¹

(Thousand metric tons unless otherwise specified)

Commodity ²	2009	2010	2011	2012	2013
METALS					
Aluminum, metal, secondary	27	40	50	50 ^e	50 ^e
Iron and steel, metal:					
Pig iron	3,483	3,987	4,137	3,936	4,041
Steel, crude	4,594	5,180	5,583	5,072	5,171
Semimanufactures, hot-rolled products	3,957	4,625	4,616	4,276	4,300 ^e
Lead, metal, secondary	29	30	32	30	28
INDUSTRIAL MINERALS					
Cement, hydraulic	3,851	3,559	4,053	3,434 ^r	3,211
Clays:					
Bentonite	177	183	160	221	226
Brick clays and related materials	2,215	1,836	1,943	1,851	1,589
Kaolin, raw	2,886	3,493	3,606	3,318	3,108
Other	377	429	499	484	465
Diatomite	--	32	46	43	49
Dolomite	337	385	369	440	392
Feldspar	431	388	407	445	411
Feldspar substitutes, including nepheline syenite	23	19	22	15	15
Gemstones, crude:					
Moldavite-bearing rock	104	103	117	74	74
Pyrope-bearing rock	26	23	17	12	16
Gypsum and anhydrite, crude	13	5	11	14	11
Lime, hydrated and quicklime	946	1,032	1,057	1,000 ^e	1,000 ^e
Nitrogen, N content of ammonia	190 ^r	120 ^r	106 ^r	115 ^r	152
Sand and gravel:					
Common sand and gravel	23,974	19,240	21,424	18,785	17,360
Foundry sand	374	473	395	491	412
Glass sand	990	888	976	849	862
Silica minerals, including quartz and quartzite	16	14	24	17	15
Stone:					
Crushed	41,307	37,270	36,717	32,535	33,004
Dimension	710	823	648	504	462
Limestone and other calcareous stones	9,488	9,828	11,244	9,858	9,605
Sulfuric acid	253	195	258	200 ^e	200 ^e
MINERAL FUELS AND RELATED MATERIALS					
Coal:					
Bituminous	10,621	11,193	10,967	10,796	8,610
Brown and lignite	45,616	43,931	46,848	43,710	40,585
Total	56,237	55,124	57,815	54,506	49,195
Fuel briquets from brown coal ^e	150	140	150	140	140
Coke, from coke ovens	2,295	2,548	2,588	2,466 ^r	2,489
Gas:					
Manufactured, all types ^e	million cubic meters	1,000	1,500	1,500	1,500
Natural, marketed	do.	180	201	187	207
Petroleum:					
Crude ³	thousand 42-gallon barrels	1,470	1,173	1,105	1,020
Refinery products ⁴	do.	52,000	58,000	53,000	55,000 ^e
Uranium:					
Mine output, U content	metric tons	286	259	252	222
U ₃ O ₈ content	do.	337	305	297	262
Concentrate production, U content	do.	243	237	216	219

^eEstimated; estimated data are rounded to no more than three significant digits. ^rRevised. do. Ditto. -- Zero.

¹Table includes data available through September 3, 2014.

²In addition to the commodities listed, ferrovanadium, secondary copper, secondary gold recovered from scrap, graphite, precious metals, and zinc metal may have been produced, but available information is inadequate to make reliable estimates of output.

³Figures were converted to barrels from production reported in thousand metric tons, as follows: 2009—217; 2010—173; 2011—163; 2012—150; and 2013—152.

⁴Estimated based on throughput reported in million metric tons, as follows: 2009—7.38; 2010—8.70; and 2011—7.57.

TABLE 2
CZECH REPUBLIC: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons unless otherwise specified)

Commodity	Major operating companies and major equity owners	Location of main facilities	Annual capacity
Aluminum, secondary	Alcan Decin Extrusions s.r.o.	Decin, northern Bohemia	NA
Do.	Kovohute Holdings DT- Mníšek Division (majority owned by Demonta Trade SE)	Mníšek pod Brdy	NA
Bentonite	KERAMOST a.s.	Most	NA
Do.	Sedlecký Kaolin a.s.	Bozicany	NA
Cement	Cement Hranice a.s. (Dyckerhoff Aktiengesellschaft, 100%)	Hranice	1,100
Do.	Ceskomoravský Cement a.s. (Heidelberg Cement AG, 100%)	Mokra	1,400 ^e
Do.	do.	Radotin	800 ^e
Do.	Holcim (Cesko) a.s. (Holcim Ltd., 100%)	Prachovice	1,200
Do.	Lafarge Cement a.s. (Lafarge S.A., 70%; STRABAG SE, 30%)	Cizkovic	1,200
Clay	LB Minerals s.r.o.	Horní Bržica	NA
Do.	KERAMOST a.s.	Most	NA
Do.	Ceske Lupkove Zavody a.s.	Nove Straseci (refractory clay)	NA
Do.	P-D Refractories CZ a.s.	Velke Opatovice (refractory clay)	NA
Do.	RAKO-LUPKY s.r.o.	Lubna u Rakovníka	NA
Do.	Kaolin Hlubany a.s. (WBB Minerals, 94%)	Podborany	NA
Coal:			
Bituminous	OKD a.s. (New World Resources N.V.)	4 mines near Ostrava and Kravina in eastern Czech Republic	13,000 ^e
Brown	Dul Kohinoor a.s. (Czech Coal Group)	Centrum Mine in Mariánské Radčice	350 ^e
Do.	Severní Energetická a.s.	CSA Mine near Most	5,000 ^e
Do.	Severoceske Doly a.s. (CEZ Group a.s., 100%)	Nastup Tusimice Mine southwest of Chomutov and Bilina Mine in Bilina	25,000 ^e
Do.	Sokolovska Uhelna a.s.	Jiri and Druzba Mines at Sokolov	10,000 ^e
Do.	Vrsanska Uhelna a.s. (Czech Coal Group)	Vrsany Mine just west of Most (contains the Vrsany and the Sverma sites)	10,000 ^e
Lignite	Lignit Hodonin s.r.o.	Hodonin, south of Moravia	500
Coke	ArcelorMittal Ostrava a.s.	Ostrava	1,500
Do.	Ostravo-Karvinské Koksovny a.s. (OKK) (Metallmex s.r.o.)	Jan Sverma coking plant near Ostrava	400
Do.	do.	Svoboda coking plant near Ostrava	650
Do.	Trinecké Železárny a.s. (Moravia Steel a.s., 69%)	Trinec	700
Feldspar	LB Minerals s.r.o.	Horní Bržica	NA
Do.	KMK Granit a.s.	Krasno	NA
Do.	Druzstvo DRUMAPO	Nemcicky	NA
Do.	Ceske Sterkopisky Spol s.r.o.	Prague	NA
Do.	AGRO Brno - Turany a.s.	Brno	NA
Feldspar substitutes (including nepheline phonolite and syenite)	KERAMOST a.s.	Most	NA
Ferrovandium	Nikom a.s. (Evraz Vitkovice Steel a.s.)	Vitkovice-Ostrava	5
Gold, metal, secondary	Kovohute Pribram Nastupickna a.s.	Pribram	NA
Do.	Galmet trade, spol. s r.o.	Dolní Brezany	NA
Graphite	Grafitove Doly Stare Mesto s.r.o.	Stare Mesto	NA
Iron and steel:			
Pig iron	ArcelorMittal Ostrava a.s. (ArcelorMittal, 100%)	Kunice-Ostrava	3,000
Do.	Trinecké Železárny a.s. (Moravia Steel a.s., 69%)	Trinec	2,100
Steel:			
Crude	ArcelorMittal Ostrava a.s. (ArcelorMittal, 100%)	Kunice-Ostrava	3,000
Do.	Evraz Vitkovice Steel a.s.	Vitkovice-Ostrava	950
Do.	Pilsen Steel s.r.o. (OAO OMZ)	Plzen	150
Do.	Poldi s.r.o. (Z-Group Steel Holding)	Kladno	120 ^e
Do.	Trinecké Železárny a.s. (Moravia Steel a.s., 69%)	Trinec	2,600
Do.	Vitkovice Heavy Machinery a.s.	Vitkovice-Ostrava	200

See footnotes at end of table.

TABLE 2—Continued
CZECH REPUBLIC: STRUCTURE OF THE MINERAL INDUSTRY IN 2013

(Thousand metric tons unless otherwise specified)

Commodity		Major operating companies and major equity owners	Location of main facilities	Annual capacity
Iron and steel—Continued:				
Steel—Continued:				
Processed products		Zelezarny Hradek a.s. (Z-Group Steel Holding)	Hradek	NA
Do.		Zelezarny Veseli, a.s. (Z-Group Steel Holding)	Veseli nad Moravou	NA
Do.		Zelezarny Chomutov s.p. (Z-Group Steel Holding)	Chomutov	NA
Do.		ZDB Drátovna a.s. (Trinecké Železarny a.s.)	Bohumín	40 ^e
Kaolin		KERAMOST a.s.	Most	NA
Do.		Sedlecky Kaolin a.s.	Bozicany	NA
Do.		LB Minerals s.r.o.	Horní Bržda	NA
Do.		Kaolin Hlubany a.s.	Podborany	NA
Do.		KSB s.r.o.	Bozicany	NA
Lead, refined, metal, secondary		Kovohute Pribram Nastupickna a.s.	Pribram	30
Natural gas	million cubic meters	Gasfield operators in Brno and Ostrava regions, including: Moravske Naftove doly a.s. Ceska Naftarska Spol s.r.o. Green Gas DPB a.s. UNIGEO a.s.	Eastern/southeastern Czech Republic, including: Hodonin do. Paskov Ostrava-Hrabova	200 ^{e,1}
Petroleum:				
Crude	thousand 42-gallon barrels	Oilfield operators around Hodonin, including: Moravske Naftove doly a.s. Ceska Naftarska Spol s.r.o. UNIGEO a.s.	Of which: Hodonin do. Ostrava-Hrabova	2,100 ^{e,1}
Refinery	thousand 42-gallon barrels per day	Paramo a.s. (Unipetrol a.s.)	Refineries at Kolin and Pardubice	20 ^e
Do.	do.	Ceska Rafinerska (Unipetrol a.s., 67.5%, Eni International B.V., 32.5%)	Refineries at Litvinov and Kralupy nad Vltavou	165
Sand, industrial (glass and foundry)		Provodinske pisky a.s.	Provodin	NA
Do.		Sklopisek Strelec a.s.	Mladejov	NA
Do.		LB Minerals s.r.o.	Horní Bržda	NA
Do.		Kalcit s.r.o.	Brno	NA
Do.		SEDOS doprava a.s.	Drnovice	NA
Do.		PEDOP s.r.o.	Lipovec	NA
Do.		SETRA s.r.o.	Brno	NA
Uranium, U content	metric tons	DIAMO s.p. (Government, 100%)	Rozna I Mine at Dolní Rozinka	500

^eEstimated. Do., do. Ditto. NA Not available.

¹Annual capacity listed is total for all deposits, mines, and companies that produce the commodity.